

CITY OF TIGARD, OREGON

RESOLUTION NO. 02-604

A RESOLUTION REVISING RESOLUTION 00-08, CITY WIDE PERSONNEL POLICIES, NO. 41.0 EDUCATION & TRAINING, AND 42.0 TRAVEL AUTHORIZATION & REIMBURSEMENT

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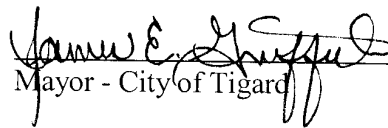
WHEREAS, the City of Tigard has determined that No. 41.0, Education & Training, and No. 42.0, Travel Authorization & Reimbursement, of the City Wide Personnel Policies are in need of updating to comply with IRS regulations and internal financial auditing practices,

NOW, THEREFORE, BE IT RESOLVED by the Tigard City Council that:

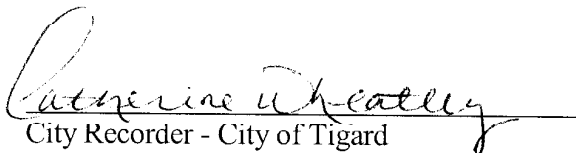
SECTION 1: The proposed revisions to Nos. 41.0 and 42.0 of the City Wide Personnel Policies, previously adopted by Council under Resolution 00-08, and attached as Exhibit A are hereby adopted

SECTION 2: This resolution is effective immediately upon passage.

PASSED: This 12<sup>th</sup> day of November 2002.

  
\_\_\_\_\_  
Mayor - City of Tigard

ATTEST:

  
\_\_\_\_\_  
City Recorder - City of Tigard

## **TRAINING, EDUCATION, TRAVEL, AND EXPENSE POLICY**

### **A. Purpose**

The City recognizes the value of allowing employees to participate in conferences, seminars, training, college courses, and meetings that will enhance the employee's ability to provide a high level of public service. City officials and employees should exercise good judgement, regard for economy, and recognition of proper use of public monies when selecting training, meetings, courses, conferences, etc. in connection with City business.

Also, this policy establishes guidelines regarding travel for the conduct of official City business and for the payment of, or reimbursement of, expenses incurred while performing such travel. All employees are expected to follow the guidelines outlined in this policy.

### **B. Scope**

This policy is applicable to all City departments. Departments may apply additional requirements so long as they are equal to or more restrictive than these standards. This policy works in conjunction with all collective bargaining contracts and the Training, Education, Travel and Expense Procedures.

### **C. Policy Statement**

Training, education, and travel expenses must have a public purpose and serve the public interest. All training, education, and travel expenses must be reasonable and necessary to conducting City business. All training, education, and travel expenses must be pre-approved by the department director and the City Manager. Persons traveling on City business are expected to be prudent and only incur costs they normally would incur if traveling on their own expense. Travel expenses solely for the benefit of an individual are not allowable. The City will not pay travel costs for persons not employed by the City unless the person 1) incurs the cost as a member of the City Council or a committee, or 2) has traveled at the specific request of the City, or 3) is serving as a volunteer to a City program, or 4) is providing services under a contract requiring such payment, or 5) is approved by the City Manager.

### **D. Training and Education**

The term "training" as used in this policy is intended to include conferences, seminars, workshops, one day courses at an educational facility or on-line, or other professional development programs of a similar nature. The term "college courses" is used to describe coursework taken through or on-line from an accredited college, university, and/or business or technical school.

The Training and Education policy is intended to apply only to programs that:

- Enhance the employee's job performance, and
- Serve as a beneficial retention tool in keeping high quality employees

Training programs, not college courses, are intended for career development purposes. Supervisors need to be very clear regarding the expectations they may create regarding such things as future job opportunities with employees when paying or reimbursing for training that is related to career development.

Applicable collective bargaining agreements must be consulted for language specific to training and/or educational reimbursement policies.

The City Manager shall sign-off on all travel/ training authorization forms.

The City retains the right to determine the mode of transportation most appropriate to the type of travel involved. Employees should consult the Training, Education, Travel and Expense Procedures for reimbursable modes of transportation.

## **Training Plan**

All department directors requesting funding for any training and/or college course for their staff shall prepare a written departmental Training Plan as part of their annual budget submittal, which must include an explanation of the following:

- The requested funding for training and college courses for their department.
- A clear justification for each requested amount.
- An explanation of how these expenditures relate to the employee's career development plans and/or performance goals.
- A prioritization of these requested expenditures in the event not all requests are approved.

The Training Plan will be submitted to the City Manager for review and final approval. Until the Training Plan has been approved by the City Manager, requests for training and/or college courses will not be authorized. Once the department Training Plan has been approved, all training and/or college courses approved for staff participation will follow the plan description.

Supervisors should discuss training and/or college course work goals with the employee in their regular performance evaluation session and they should be specifically detailed in their written evaluation form.

## **Training**

Department directors need to evaluate the value of the proposed training and whether it is the best way to acquire the information for the City. All training must be tied to the department's Training Plan.

The City will pay for all registration fees for mandatory training programs. Employees should consult the Training, Education, Travel and Expense Procedures for reimbursable expenses related to travel, meals, and lodging in conjunction with training. Travel time will be handled according to applicable collective bargaining agreements and/or City policy, state or federal law, as appropriate.

When appropriate, employees may be asked to share/present information they have received from their training to others in the department.

Participants must complete an evaluation summary form regarding the training program available from Human Resources after attendance at training. This form will be placed in the employee's personnel file.

The department director may authorize the payment of expenses for voluntary training as they deem appropriate providing the training is beneficial to the department and/or City operations and included in the Training Plan.

All arrangements for training will be made in the most cost and time efficient manner as possible.

Only expenses for the employee will be paid for. All books and materials paid for by the City of Tigard will become the property of the City.

## **Education (College Courses)**

The City does not intend to pay employees to obtain college degrees. Rather, it will reimburse for individual college courses only. The course must be related to the current job that the employee holds, as described in their current job classification description.

Mandatory college courses, which are related to the employee's current job, shall have tuition, books and hours attended paid for by the City. Employees should consult the Training, Education, Travel and Expense Procedures for reimbursable expenses related to travel, meals, and lodging. College courses that are not mandatory, but are job related, will have only tuition, books, and related materials (to be retained by the City) paid for by the City. Non-mandatory college courses that are not job related shall have none of the above paid for by the City.

In those instances where the City reimburses for some or all of the expenses, employees must document satisfactory completion of the course.

To be eligible for reimbursement of non-mandatory college courses that are job related as described above, employees must receive a grade of "C" or better, or "Passing" for the course and provide written evidence of that to their supervisor. If the employee does not receive a passing grade for the course, they will not be reimbursed.

The City will provide tuition reimbursement for college coursework not to exceed the tuition level established by the State of Oregon Higher Education Department for State colleges/universities. Department directors need to explore less costly college courses available at other institutions before finalizing their Training Plans.

Prior to an employee participating in a college course, which may include reimbursement by the City, the employee will be required to sign a written authorization to have any costs paid for by the City deducted from their final paycheck, should they fail to comply with the reimbursement guidelines.

The following reimbursement guidelines shall be enforced when an employee separates from the City service for any reason except involuntary dismissal:

- Within one year of the completion date of the class, 100% of the amount of reimbursement will be deducted from the employee's final paycheck.
- Between one and two years after the completion date of the class, 50% of the amount of the reimbursement will be deducted from the employee's final paycheck.

If the reimbursement amount owed is more than the final paycheck, the employee must pay off the remaining amount. Failure to re-pay the amount owed to the City will result in the outstanding amount being turned over to a collection agency.

Department directors are responsible for monitoring these reimbursement requirements.

#### **E. Travel and Expense**

The City of Tigard will only pay or reimburse travel, meal and other expenses that are deemed non-taxable by the IRS unless specified by union contract. The paid and reimbursement amounts will be determined by IRS guidelines when applicable. Employees should consult the Training, Education, Travel and Expense Procedures for detail on which expenses will be paid or reimbursed.

Employees may not accrue frequent flyer miles for personal use. If employees do accrue personal frequent flyer miles while traveling for City business, the miles must be retained and applied to City travel in the future.

The City retains the right to determine the mode of transportation most appropriate to the type of travel involved.

Employees are encouraged to use City pool vehicles when appropriate. The City will not reimburse for private vehicle use unless City pool cars are not available and the employee's supervisor approves usage of a private vehicle. Employee's personal insurance information must be on file with the Risk Management Division before a personal vehicle can be used for City business. Private vehicle usage that meets the preceding requirements will be reimbursed at the federal mileage rate.

Travel time will be handled according to applicable collective bargaining agreements and/or City policy, state, federal law, as appropriate.

Any expenses for family members or other non-City employees who accompany the employee on a trip are not reimbursable.